

Process Mapping

This document provides some basic information on process mapping and easy-to-follow guidance on creating a process map.

What is a Process Map?

A process map, also called a process flowchart, visually shows the steps of a work activity. This often includes decisions to be made, documents involved, and the people carrying out the various steps.

When mapping a process, you simply draw a certain shape for each step and connect them with arrows to show the sequential flow of the steps within the work activity. Figure 1 shows a basic process map.

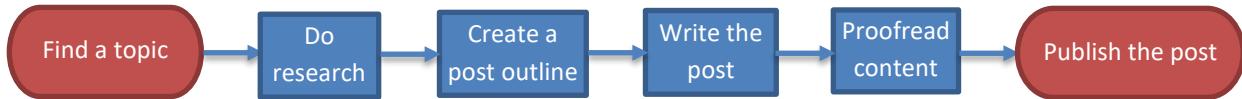


Figure 1. Basic Process Map.

Process Map Shapes

Each step of a work activity process is represented by a specific shape in a process map. There are nearly 30 standard shapes that you *can* use in process mapping. However, the five most common used shapes, as shown in Figure 2, will be sufficient to develop most process maps.

| Shape | Name | Use |
|-------|------------------|--|
| | Activity/Process | Represents a step/activity of a process. |
| | Decision | Represents a decision that must be made and leads to different (alternative) paths within the process. |
| | Start/End | Represents the start and end points of a process. |
| | Arrow | Represents the connection between steps and indicates the direction of the process flow. |
| | Document | Represents data or information that can be read by people |

Figure 2. Common Process Map Shapes.

Process Mapping Best Practices

- Before identifying the process steps, start with identifying the start and end points of the process. This helps with setting limits.
- Make your process maps as easy and simple as possible so they can be read and understood by anyone. Keep only the necessary details on your map. Not less or more than needed for people to understand the steps in the process.
- Make sure you use the appropriate process map shapes to avoid confusion about the process steps and their flow.
- Include input from all key stakeholders when mapping the process to avoid missing important information or misrepresenting any steps.

How to Create a Process Map | Process Mapping Steps

Now, that you not only know what a process map is, but also are familiar with the most common process mapping shapes and important process mapping best practices, you should be ready to create a process map. Follow the steps shown in Figure 3 and discussed below in more detail.

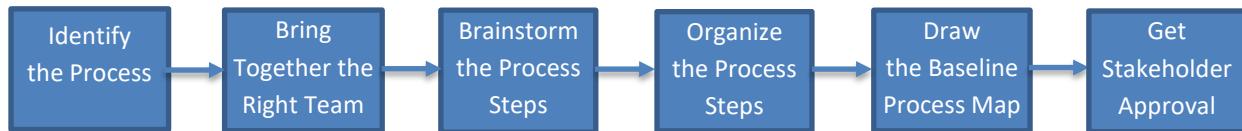


Figure 3. Process Mapping Steps.

Step 1: Identify the Process

Decide which process you are going to map, then give it a name. Ask yourself the following questions:

- Is it about improving a cumbersome process that led to a team's underperformance?
- Is it a new process important to achieving a new strategy effectively?
- Is it about streamlining a process that directly makes an impact on customer satisfaction?

Step 2: Bring Together the Right Team

The input of everyone involved in the process is necessary to make sure that you cover every aspect of the process when mapping it. The right team should **include those stakeholders that do and manage the process as well as those that can provide additional valuable input**.

Step 3: Brainstorm the Process Steps

With your team, discuss the following:

- Where does the process begin and end?
- What are the steps in between these two points?
- What are the inputs and outputs, including documents, of the process?
- Who does what, when, where, and how?
- What decisions, if any, must be made and where?

Step 4: Organize the Process Steps

Together with your team arrange all step in a sequential order with the appropriate connections from start to end.

Step 5: Draw the Baseline Process Map

Based on the results of Step 4, draw a process map - keep in mind the process mapping best practice of using the appropriate shapes.

Step 6: Get Stakeholder Approval

Distribute the process map to the other team member stakeholders for review and obtain their approval. If there are any edits, update the map and repeat Step 6.